

# CONFERENCE OF CIRCUIT COURT ADMINISTRATORS MEETING

**Minutes**  
**January 24, 2017**

## **Conference Members Present:**

Timothy Sheridan (Chair)  
Doug Hofstedt (Vice-Chair)  
Matthew Barrett  
Emanuel Demedis  
Michael Howard  
Melissa Johnson  
Jennifer Keiser  
Joy Keller  
Susan Leary  
Judy Lohman  
Lionel Moore  
Judy Rupp  
Teri Scherer

## **Administrative Office of the Courts:**

Lynne Wheeler

## **Deputy Court Administrator Guests:**

Richard Abbott  
Stephanie Medina  
Cherie Meienschein  
Erin Melton  
Joanne Molloy  
Erica Payne-Santiago  
Vicki Ross  
Melinda Sweeney

A meeting of the Conference of Circuit Court Administrators was held on January 24, 2017, at the Judiciary Education & Conference Center, beginning at 10:00 AM. Tim Sheridan began the meeting by welcoming everyone and asked all attendees to introduce themselves. He then called for approval of the minutes from the November 29, 2016 meeting. Jenn Keiser moved for their approval with the addition of Melissa Johnson's name to the attendees. The motion to approve was seconded by Doug Hofstedt and passed.

## **SELF-HELP CHAT BUTTON – Lonni Summers**

- Lonni gave a PowerPoint presentation in which she delivered statistics for both walk-in and remote self-help centers, and outlined the proposed self-help chat button.
  - The Family Law Self-Help Centers and District Court Self-Help Resource Centers are walk-in facilities where the public is assisted in person.
  - The Maryland Courts Self-Help Center assists the public remotely, via telephone, live chat, and email.

- Court leadership is being offered the opportunity to add the Live Chat button to their court websites. The addition of the button would provide the following benefits:
  - Attorneys can use “canned content” to respond to people’s questions in chat, saving time on both the attorneys’ end, and on the public’s end.
  - Attorneys can also chat in multiple windows at a time, serving several people, thus saving time.
    - The average wait time for calls is approximately 1.5 minutes, with the peak time from 9:00 AM to 12:00 PM. There are between 9 and 11 attorneys receiving calls throughout the day. On the other hand, the average wait time on chat is less than 10 seconds.
  - The live chat option features extended hours, as they are open until 8:00 PM Monday through Friday.
  - Online webinars are available as resources, conducted by attorneys who work in self-help centers.
- According to the data that has been gathered, people tend to use chat more for Family cases than for other case types.
- Although the remote methods are proving highly beneficial, the walk-in centers are valuable and will most likely be here to stay. No discussions have occurred with regards to eliminating on-site walk-in centers.

### **CONNECT MATRIX FOLLOW-UP – Lee Robinson**

- Lee provided each Administrator with a folder containing screenshots of their respective matrix and contact information when in need of support.
- The importance of having two people set up to approve was reiterated. There does not need to be one person per level in CONNECT. Both people would be on the same level, in order to perform the same approval functions.
- In an effort to remember log-in information and to remain familiar with the matrix, it is recommended that Administrators log in frequently.

### **QUESTIONS/CONCERNS:**

- Melissa has encountered issues with new POIs’ level of access, leaving them unable to update their information.
  - She will send Lee screenshots to show the issues, and he will work to resolve them.
- Doug had difficulty finding the job codes for his positions. There was confusion between the location code and department code.
  - Lee said either the location code or department code seems to be in reverse. He recommended that anyone with issues call the number to contact JIS to find someone to fix the problem. Typically, Jeff Qualey and Karen Kotschenreuther would be good resources. There is also Metaformers (Andrew Beck), and a team is being formed at JIS to perform the same tasks Metaformers is performing after their departure.

- Doug would appreciate more guidance on how to gain access to both the matrix and Odyssey for MDEC. The general consensus is that the priority at the moment is to get everyone into MDEC.
  - Michael Howard and Matt Barrett shared that there is a security access form that is used for access to Odyssey, but they were not sure if it also sufficed to set up CONNECT POIs.
  - Lee will look at it with the Project Review Committee and work to find a way to take care of access to both at the same time.
- Judy Lohman asked if Administrators were to update the COOP plan in the same place.
  - Lee will check with Mindy.

### **FAMILY LAW DIVISION STATUS UPDATE – Kelly Franks/Lou Gieszl**

- Kelly presented an overview of the Grants page on the Procurement website, pointing out where to find all related forms.
- The goal is to provide notice of funding for FY18 to courts two weeks earlier this year, in May.
- The Tier 1 and Tier 2 report has been created. Budget hearings are happening this week, so the legislature's stance will be known soon. The Grants department is not mentioned in the legislature's report this session. Not being called in for hearings could be a good sign, but there is no way to know for sure at this time.
- With regards to Tracy Watkins' and Connie Kratovil-Lavelle's now vacant positions, Lou explained that both positions will be filled. Several promising candidates have been found for Connie's replacement, but it is not her official last day yet, so there will not be any movement right now. Hope Gary is Acting Director of FCCIP. There is discussion about organizational structure changes as a result of filling both positions, but nothing has been decided. Connie and Tracy both worked hard to create a seamless transition.
- Guardianship Positions
  - There are 7 positions funded, serving 12 counties. Funding is still available and can be added to grant applications if Court Administrators would like. There is also a regional person that can be utilized by smaller jurisdictions.
- Family Law for the People Seminars
  - These are informational seminars addressing common family issues for pro se litigants
    - Private attorneys host the seminars, in 10 counties this year. Charles County starts tomorrow. Funding is available for these, as well.
- Domestic Violence Training
  - Judges can go to training here in Annapolis in May. David Shulte is in charge of planning. Information will be out soon.

## **2017-2018 MEETING SCHEDULE – Tim Sheridan**

- The current September meeting date is the 26<sup>th</sup>, which conflicts with the MAACM Conference. We will either look for a date to reschedule or cancel the meeting altogether.

## **DIVISION OF DUTIES (DEPUTIES & ADMINISTRATORS) – Tim Sheridan**

- Various Court Administrators shared how work is divided between themselves and their Deputy/Assistant Court Administrators.
  - Judy Rupp has 4 people in her office. The main functions are Fiscal, HR, Facilities, and Admin. All departments fall under those 4 headings. Each person heads up key areas. The roles and responsibilities are assigned, but also shared. Everyone knows what the others are doing. Cross-training and communication are strengths. Individual meetings happen weekly, and all 4 meet on a less frequent basis. There are desk manuals, and all procedures are in writing.
  - Lionel Moore has 35 judges in 3 buildings. Stephanie Medina helps, in the absence of personnel policies, to create management structures. She is currently completing a management instructional packet. Lionel described the issues with having a City based HR system as it applies to Court personnel.
  - Emanuel Demedis divides duties as they present themselves. Vicki Ross has taken over many duties to reduce Emanuel's workload.
  - Teri Scherer has Joanne Molloy to assist with duties. She knows how to do everything Teri knows how to do, and receives a copy of every email Teri receives.
  - Sondra Battle and Erica Payne-Santiago mostly mirror each other's duties, but the majority of budget & IT-related tasks are handled by Sondra, while other matters, such as programs and MDEC go to Erica.
  - Melissa Johnson has Cherie Meienschein to handle grants and financials, based on her prior expertise.
  - Susan Leary has Bobbie Erb 3 days a week. They work out of two different courthouse locations, so they each handle what goes on in their respective buildings. HR is managed by Susan, visiting judges' schedules are handled by Bobbie, and they work together on things like the budget and the State of the Court report. Bobbie was one of the first Court Administrators, so she knows a great deal.
  - Judy Lohman has Erin Melton, who has a strong administration background from working for Judge Dwyer. She handles DCM and caseflow-related matters. Budgets, finance, grants, and Drug Court are all managed by Judy. Their offices are located on two different floors of the courthouse.
- Tim suggested that if a Court Administrator can't attend a CCCA meeting, the Deputy should attend in his or her stead.

## **LOWER EASTERN SHORE MDEC ROLLOUT – *Melissa Johnson/Joy Keller***

- Melissa emphasized the importance of finding a knowledgeable SME. Having someone who is familiar with your court process, who knows what is coming, and who communicates well is worth sacrificing that person's presence in the office. One employee from the State and one from the County would be ideal. Attendance and consistency are necessities. They also need to be able to stand up and speak up for the court.
- Things are going rather smoothly. The on-site support was great. The training was important, but the on-site help was more beneficial.
- There is one central location being used for training (3 rooms for approx. 6 weeks). Colleges are potential training sites. It is never too early to start thinking about possible locations.
- General computer proficiency is crucial.
- Any opportunity you have to visit courts of similar sizes should be seized. It alleviates anxiety when you know what to expect.
- Melissa recommends having the judges go and sit with judges who are currently using Judges' Edition to familiarize themselves.
- Walking in files to judges makes more work for the clerks. It is easier to "rip off the Band-Aid" so judges do not use the paper copies as a crutch.
- The caseload can be adjusted in the beginning. Melissa suggests lightening it by 50% the first week of go-live, working with 75% of your normal docket the second week, and including a variety of case types throughout the process.
- There are fewer issues because many have been identified prior to rollout.
- Chief Judge Morrissey and Lauren Troxell did a lot of outreach with the Bar. The more contact with the local Bar to let them know to register for e-filing, the better.
- Ask ahead of time about hardware/equipment you will need.
- It can be frustrating having contractors for network infrastructure in the building working on things while you are trying to work, drilling holes and such. This might need to be addressed.
- From a space perspective, fewer rolling carts carrying monitors would be preferred.

## **OTHER BUSINESS**

- Committee Assignments
  - Inviting Deputies to be on subcommittees was encouraged.
    - The Courthouse Equity subcommittee needs someone, preferably from a small or medium-sized court.
    - If any Administrator wants to be on a subcommittee on which Tim is currently serving, please let him know.
- SharePoint Access for Deputies
  - Please email Lynne if you would like your Deputy Administrator to be given access to view documents.

## **COMMITTEE UPDATES**

### **❖ JUDICIAL COUNCIL – *Tim Sheridan***

- The Council met on January 18, 2017. Chief Judge Morrissey gave an update on the MDEC Lower & Upper Shore rollouts. He explained that there are fewer issues with these rollouts than previous ones.
- The Education Committee's brochure for classes is posted and distributed. The Judicial Assistants' course will be rolled out.
- The judicial qualification proposal outlines the reaction to people running in judicial elections. There is talk about changing qualifications, possibly via a constitutional amendment.

### **❖ CONFERENCE OF CIRCUIT JUDGES – *Tim Sheridan***

- The Graduated Sanctions Matrix will be released on October 1, 2017.
- A presentation was given by Judge Pierson and Michele McDonald about training parameters for the selection of disabled jurors. The general consensus is that there should be a training module for judges to prepare.
- There was discussion about a workgroup whose function is to develop standard language with regards to how to include firearms turn-in notice on verdict sheet and other forms as appropriate.
- An Annual Magistrates' Conference has been proposed, probably taking place fall of this year.
- A mentoring program has been established for new judges.

### **❖ CONFERENCE OF CIRCUIT COURT CLERKS – *Doug Hofstedt***

- The CCCC met today, as well. The two main topics were:
  - Self-Help Chat Button – Lonni gave the same presentation to the Clerks as she did the Administrators.
- Judicial auditing is occurring now, in Cecil, Anne Arundel, and Queen Anne's counties.

### **❖ COURT TECHNOLOGY – *Matthew Barrett***

- Matt sent out the minutes from November. Nothing significant was discussed.
- They are now meeting every other month, with two meetings taking place at 2:00 PM, two at 6:00 PM, and two at 9:00 AM.

- Judge Everngam asked Matt to chair the Email Deletion Policy workgroup. They are recruiting members now, in order to meet the 90-day deadline for a decision as to whether or not the Judiciary should adopt the Email Retention Policy.
  - The videoconferencing workgroup has not met in a few months.
  - JIS is working on a virtual desktop, which could eliminate the need for local CPU's/local storage of files.
- ❖ **COURT ACCESS – *Judy Lohman***
- No meeting has been held since December. Judy will check on the minutes from the last meeting and find out the dates for this year's meetings. The approved minutes will be disseminated once they are received.
- ❖ **SPECIALTY COURTS & DOCKETS – *Judy Rupp***
- This subcommittee has not met since last year.
  - A conference call is scheduled for February 1, 2017 to review Frederick County's veterans' court application.
- ❖ **ADR – *Tim Sheridan***
- They are embarking on program to revise standards of conduct of mediators, to refresh and update them to combine external standards and courtroom standards.
- ❖ **SENIOR JUDGES – *Erica Payne-Santiago, on behalf of Sondra Battle***
- Judge Kenney introduced Judge Barry Hughes as a new member.
  - Kelley discussed the legislative updates.
  - Some jurisdictions continue to experience problems with timesheets, expense reports, and mileage entries. The resources for help with these items would be Lolli Petrillo, Marti Robinson, and Sharon Hoff.
  - It was recommended that JIS be invited to a meeting to discuss MDEC issues.
- ❖ **COURT OPERATIONS – *Sandy Smith***
- Sandy was not present. No update provided.
- ❖ **JURY USE – *Sandy Smith/Anne SanGiovanni***
- Sandy and Anne were unable to attend today's meeting. The next meeting will take place in February.
- ❖ **CASE MANAGEMENT – *Tim Sheridan and Jenn Keiser***
- This group has not met yet.
- ❖ **COURTHOUSE EQUITY – *Stephanie Medina***
- The subcommittee met on November 15, 2016. Stephanie will send out the approved minutes.
  - Their aim is to make sure all jurisdictions have accomplished their Tier 1 goals.
  - Courts should take into consideration their Tier 1 and Tier 2 goals when submitting their grant applications.
  - The group is looking for a representative from a small or medium-sized court.

- ❖ **FORMS – *Doug Hofstedt***
  - Doug's term is over. The subcommittee would appreciate nominations for a replacement. A name is needed by February/March.
- ❖ **COURT REPORTING WORKGROUP – *Teri Scherer***
  - This subcommittee has not met in a long time. No update.
- ❖ **GRANTS ADVISORY WORKGROUP – *Sondra Battle (via Erica Payne-Santiago)***
  - No update. This workgroup is no longer active.
- ❖ **RECORDS RETENTION WORKGROUP – *Jenn Keiser***
  - No update. Jenn had to leave.
- ❖ **EDUCATION – *Judy Lohman***
  - The mentor program is available.
  - Magistrates want representation in their own conferences. There is not enough funding for a conference this year, but there is the possibility of holding something at the JECC.
- ❖ **PROFESSIONAL DEVELOPMENT – *Tim Sheridan***
  - The next meeting will take place tomorrow, January 25, 2017.
- ❖ **JUDICIAL ASSISTANTS EDUCATIONAL PROGRAM**
  - The group is asking for other judicial assistants to join. Stacey wants to create a webinar to get assistants' feedback.
- ❖ **TECHNOLOGY TRAINING – *Doug Hofstedt***
  - There has been a changeover, so they are looking for people to staff the subcommittee.
  - A discussion was held about MDEC for newly-appointed judges.
  - They will meet again in two weeks.
- ❖ **STATE OF THE COURT REPORTS**
  - No update provided.